Sierra Electronic Resource Management

# How to Manage 360 Core Bibliographic and Coverage Data

## The Initial Load

### Bibliographic record loading:

1. Bring the file of bibliographic records into Sierra with Data Exchange.
2. Load these records, first checking the ‘Use Review File’ box.
3. Navigate to Create Lists.
4. Choose a review file with a maximum at least as large as the file of the bibliographic records just loaded. Click on the Copy icon and scroll down to the bottom. The file will begin with ‘Load: inserted records for…’ Select it and click on ‘OK’. You will use this file when loading coverage.

### Headings reports:

Review entries in Headings Reports as desired.

* Entries in the Headings used for the first-time report
* Entries in the Invalid headings report if an author or subject matches the 4xx field in an authority record
* Entries in the Duplicate entries report if the library includes ISSN/ISBNs in this report.

### Catalog ERM:

If you have not already done this, create a Resource Record for every database in the coverage file from 360 Core. This work must be completed before loading coverage files.

**Note:** Use text in the column labeled ‘Resource’ in the Resource ID field in resource records.

Refer [here](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_coverage_data.html) for character limits for data in the coverage file, in particular, the 64 byte limit for Resource (or Provider). These Resource ID’s may be adjusted with the Coverage Spreadsheet Conversion Rules or edited in Excel to shorten overly long Resource names before loading coverage files. In the 360 Client Center, you may add the name used in the Resource ID field in Sierra ERM in the Custom Database Name field. It will be output into the PROVIDER column of the coverage file.

### Coverage loading:

1. Navigate to Coverage Load.
2. Click on ‘Select File’, find the csv coverage file from 360 Core and click on ‘continue.’
3. Change the dropdown for Load Catalog from Range to Review and in the Review file dropdown, find and select the file of bibliographic records from 360 Core just loaded.

TIP: Loading against a review file ensures that holdings records created in the coverage loading process will only attach to these bibliographic records and not ones in the catalog for copies of journals or books in the library’s physical collection having the same title/ISSN/etc.

1. In Load Coverage, change ‘Match on’ to ‘None’ in both dropdowns, leaving just ALTLOOKUP. There should be a 1-to-1 correspondence between the 001 fields in the bibliographic records from 360 Core and the entries in the TitleID column of the csv file from them. TitleID is used as ALTLOOKUP in Load Coverage. Doing this will cut the time it takes to Load Coverage in half. Only do this step when loading against a review file of bibliographic records and when the 001 field in the bibliographic records matches the TitleID’s in the ALTLOOKUP column of the coverage file.

If desired, click on the dropdown for ‘Limit to provider(s)’ to review the Resource (Provider) entries in the csv file.

1. Click on the ‘Submit’ button.

### Coverage Load Results Reports:

When the coverage load has completed, click on the View Results tab on the left.

* The **Catalog Updates** report gives details about the creation of holdings records and any errors that may have occurred with that process.
* The **Coverage Updates** report gives details about the creation of entries in the coverage database and any errors that may have occurred in the process.
* The **Titles not in file** report will have no entries the first-time coverage is loaded from 360 Core.
* The **Resources not updated** report details database entries in the coverage file in ERM that were not included in the new file. If you have loaded coverage from a source other than 360 Core, those resource names will be listed.

### Subsequent loads (usually monthly but the library may select a different frequency).

### Bibliographic record loading:

360 Core provides 3 files of bibliographic records after the initial load—delete, new, and changed records. Upload these records into Sierra in Data Exchange.

**Load the Bibliographic records**:

* Load the file of **delete** bibliographic records, first checking ‘Use Review Files.’ Navigate to Create Lists, find and copy these records into a review file. Navigate to Delete Records, find this review file in the dropdown, select ‘Delete the listed BIBLIOGRAPHIC record AND all attached records’, and then ‘start’ to delete these from Sierra. These are titles for which the library no longer has access from any database.
* Load the file of **new** bibliographic records. These are titles for which the library has access for the first time.
* Load the file of **changed** bibliographic records. These are titles for which the library lost access from one or more databases but continues to have access in at least one database OR the MARC record has been updated.

Create a review file of all 360 Core bibliographic records that are now in Sierra. These records will have ‘ssj’ for full bibliographic records or ‘ssib’ for brief bibliographic records in either the 001 field or 035 field, depending on the profile completed with 360 Core.

You will load coverage against this review file.

### Headings reports:

Review entries in Headings Reports as desired.

* Entries in the Headings used for the first-time report
* Entries in the Invalid headings report if an author or subject matches the 4xx field in an authority record
* Entries in the Duplicate entries report if the library includes ISSN/ISBN’s in this report.
* Entries in the Blind references report if a deleted bibliographic record had the only occurrence in the index of the 1xx field in an authority record in Sierra.

### Coverage load:

1. Go to Coverage Edit.
2. Click on ‘Select File‘, select your coverage file from 360 Core, and click on ‘continue.’
3. Change Load Catalog from ‘Range‘ to ‘Review’ and select the review file you created in the step above in the drop-down.

This process adds new holdings records to the coverage database, confirms the presence of pre-existing ones still needed, and determines which holdings records are no longer needed.

1. In Load Coverage, change ‘Match on’ to ‘None’ in both dropdowns.

This process compares the new coverage file to the last one loaded.

1. Click on Submit.

### Coverage Load Results Reports

When the coverage load has completed, click on the View Results tab on the left.

* + The **Catalog Updates** report gives information on the creation of new and confirmation of pre-existing holdings records attached to bibliographic records.
	+ The **Coverage Updates** report gives details on activity in the Coverage Database, confirming that 1) data is the same, 2) data has changed (different start or end date, for example), and 3) new data has been added.
	+ The **Titles not in file** report delineates titles in each Resource that was in the last load and NOT in the new coverage file. You will delete all of these.
	+ The **Resources not updated** report details Resources (databases) that were in the last load and not this one. This may be because you no longer subscribe to it, or because the Resource ID changed, or because you load that coverage from another source.

Deleting **Titles not in file** generates a review file of the holdings records that had displayed the coverage you just deleted.

To view this review file of holdings records to delete (because you deleted the coverage information displayed in them):

a. Navigate to Create Lists

b. Select an empty review file

c. Click on the 'copy' icon at the top

d. Scroll to the bottom of the list. It is likely to be the last one and will be called ‘Delete Candidates…’

e. Review the records to be sure that they no longer have coverage data (start dates, URL’s etc.)

f. Navigate to Delete Records and delete the holdings records in the file named ‘Delete Candidates’.

To review, there are 3 steps for updating holdings records:

* + First delete 'titles not in file' to update the coverage database.
	+ Then navigate to Create Lists to find the file of holdings records (attached to bibliographic records) no longer needed
* Select an empty review file
* Click on the Copy icon
* Scroll to the bottom of the list
* Select the file including the name ‘Delete Candidates’
* Finally, navigate to Delete Records to delete the holdings record in the review file.
* This removes any holdings records currently in Sierra that are no longer need because an e-journal is no longer in one database, but the library still has access to it in a different database.

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